

Concur Reference Sheet

This Reference Sheet and the **Concur Getting Started QuickStart Guide** detail how to book travel and submit expenses. For more help with expenses or booking, call Abby at 571-882-9972, or for issues with travel: Direct Travel at 877-848-4473 during normal business hours.

Travel	Expense
<p><i>When you log into Concur you will see a logo for Direct Travel, this company is partnered with Concur to support travel</i></p> <p><u>Airfare:</u></p> <ul style="list-style-type: none"> - Preting is direct billed for flights on Concur – this is the default credit card when booking. - If you find a flight you want on another site, you can find the same flight in Concur by selecting +/- 2 hours within the ticket times. - If your trip gets cancelled, it is your responsibility to cancel ticket or incur fees. <p><u>Hotel:</u></p> <ul style="list-style-type: none"> - When booking your hotel room, use your personal credit card. If requested with enough time, Preting can coordinate and submit a CC authorization form for room, tax, & parking only. - Concur will show you correct per diem rates for your destination. Hotel rates (before tax) must be less than or equal to per diem rates. If there are no hotels within per diem within 15-mile radius, please contact team@preting.com. - Booking non-refundable hotels is not recommended and may not be reimbursed if trip is cancelled. <p><u>Rental Car:</u> When booking your rental car, you will use your personal credit card. Most contracts do not authorize reimbursement for rental car insurance. Please check your personal coverage – most personal insurance covers rental vehicles.</p> <p><u>How to cancel a ticket/booking:</u></p> <ul style="list-style-type: none"> - < 24-hours after booking: Cancel booking online & call Direct Travel to ensure all aspects of the trip were cancelled. Notify Preting - If you do not cancel all parts of trip, you will be responsible for the expenses. - > 24-hours after booking: Cancel booking online & call Direct Travel to ensure all aspects of the trip were cancelled. Notify Preting 	<p>Submit Expense Report within 5 days of return from trip. In addition to notes in the Concur Getting Started QuickStart Guide, here are a few Preting specific guidelines:</p> <p><u>Create a New Expense Report Notes:</u></p> <ul style="list-style-type: none"> - Report Name: Include Contract Name, Trip Dates, Location, your name (<i>Ex: JONE (1-5 Oct 17) Tampa, FL_ Jon Do</i>) - Report Date: Date you are submitting the expense report - Business Purpose: TDY, Training, Deployment, Visa, etc. - Comments: Additional notes to help justify the expense and ensure quick approval. - Contract: Select your contract - Travel: Most expenses will be Travel (On Contract: Reimbursable), if you are not sure, please ask! <p><u>Expense Notes:</u></p> <ul style="list-style-type: none"> - Attach receipts for everything - Hotel: Itemize total hotel nightly rate, and hotel tax rate (itemize button at bottom) - Car rental: Attach receipt, and provide total amount of rental - Per Diem: Use comments and list out total days and travel days, and provide total of per diem. It will ask for receipt, please attach your TAR in PDF form, or snapshot of GSA rates for your TDY location. - POV Mileage: only claim if pre-approved. Must attach snapshot of mileage details (Point A to B) even with use of calculator - Miscellaneous: Only use this category if an expense doesn't fit into one of the other expense categories (ex: visas, conference fees, etc.) - Airfare: Most of the time this will be billed to Preting if booked through Concur, but it still needs to be on your expense report. Payment type will be – Company Paid.